



6 Steps to Meaningful Charitable Giving

It's a privilege to be able to support the causes and communities that matter most to you. When you include charitable giving in your overall wealth plan, you are aligning your financial goals with your personal values to create positive change in the world.

Whether you're just beginning to explore philanthropy or looking to refine your approach, these six simple steps can help guide your journey and make your giving more impactful and rewarding.



1. DISCOVER WHAT MATTERS MOST TO YOU

Start by thinking about your values. What causes are close to your heart? What kind of impact do you want to make in the world? Whether it's protecting the environment, supporting education, or helping your local community, knowing your "why" is the first step toward meaningful giving.



2. CHOOSE THE RIGHT ORGANIZATIONS

Explore charities and nonprofits that align with your passions. Look into the work they do, the communities they serve, and how they use donations. Choosing organizations that reflect your values helps ensure your giving makes the impact you intend.



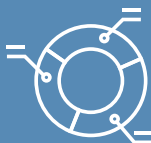
3. PICK YOUR GIVING METHOD

There are many ways to give; you can donate, engage directly with charities, organize a fundraising event, and so much more. Choosing how you give to charity is a personal decision and finding the method that fits your lifestyle and values can make your generosity even more meaningful.



4. CONSULT YOUR ADVISOR

Charitable giving is not only a meaningful way to support the causes you care about—it can also be a smart part of your financial strategy. A giving plan that fits into your overall wealth and estate planning offers valuable benefits such as tax efficiency, as donations generate federal and provincial tax credits that can be used right away or carried forward for up to five years.



5. STAY CONNECTED AND SEE THE IMPACT

Engage with the charities you support. Attend events, volunteer, read their updates, or visit their programs. Seeing the difference your contributions make is incredibly rewarding—and keeps you inspired. Consider involving your family or friends to join the cause.



6. REVIEW AND ADJUST OVER TIME

Your interests may evolve, and new needs may arise. Philanthropy is a journey, so you should revisit your charitable giving plan regularly to make sure it still reflects your values and goals.

At Raymond James, we offer a distinct approach to philanthropy through our Charitable Giving Fund (CGF) with the Raymond James Canada Foundation. A CGF integrates donor-advised funds to strategic wealth and estate planning, and offers flexibility, privacy, and long-term impact. This makes it a great option for individuals and families who want to give with purpose and without the complexity of administration.

Talk to your Raymond James advisor today to learn more on how you can get started in your charitable giving journey or review your current approach.

rjcfcharitablegiving.ca



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